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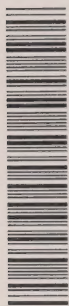
③ The U.S. Visitor to Canada -

A comparison of three data sources

of the 1971 U.S. Visitor to Canada



Workshop Paper submitted for discussion by
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FOREWORD

In planning marketing strategy for the U.S. vacation market, the Canadian Government Travel Bureau has been using three data sources. The U.S. visitors survey (auto exit survey) was carried out in the summer quarters of 1967, 1968 and 1971. An air visitors exit portion was carried in the summer of 1971 at airports. The continuing twelve month omnibus syndicated survey of U.S. households by Simmons and Associates is especially important for media placement. The third source is the U.S. Census of Population. To these has been added the 1971 Better Homes and Gardens survey of the Family Vacation Market.

The report seeks to compare the results of these four surveys. A number of discrepancies appear to exist. It is the difference between the type of respondents covered which would explain most of these discrepancies. While the Simmons survey covered the total U.S. population the other surveys only covered specific "populations". The Better Homes and Gardens mail panel study covered only family travel while the U.S. air and auto visitor (exit) surveys covered all parties leaving Canada but only during the peak summer quarter. However, by examining the similarities and differences that do exist among the surveys result and attempting to explain them, a more complete picture of the U.S. travel market to Canada can be obtained.

During March and April 1973 two new sources of data on the U.S. vacation travel market have been obtained by the C.G.T.B. Marketing Research Office. These are the U.S. Vacation Market Segmentation Study and the syndicated survey of leisure patterns and vacation travel by Midwest Research Institute of Kansas City. These remain confidential. In the near future the 1972 U.S. Census of Travel will become available from the U.S. Department of Commerce. A new version of this paper will be issued later to include these new sources.

It should be appreciated that each study is designed to specific objectives and are hence based on different sample sizes and characteristics. The reader is invited to write us with comments or for further information.

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Description of the Surveys

Better Homes and Gardens Study -

This study was concerned with family vacation travel within the past 12 months. Mailback questionnaires were sent to 10,000 panel member families (i.e. more than one - member households) in October 1971 by National Family Inc. Of these questionnaires, 80.6% were returned completed. 9.1% of these responding families had vacationed partly or entirely within Canada. The figures on the following pages, then refer to these families who travelled in Canada.

Simmons Study -

Annually, personal interviews are conducted over a period of a year among a national probability sample of 15,000 U.S. households comprising approximately 27,000 people. Questions on foreign travel are concerned with trips taken within the past 5 years. Media readership and socio-demographic characteristics are cross-tabulated for media strategy for potential visitors.

U.S. Auto Exit Survey -

The Canadian Government Travel Bureau joined the Ontario Department of Tourism and Industry to commission this large-scale national survey during the summer months (July to September) of 1971. Together with comparable studies done in 1967 and 1968, it provides trend data on the travel patterns of U.S. auto visitors to Canada. A sample of U.S. visitors are interviewed as they leave Canada by car at selected border exit points. The information collected concerns characteristics of the visitors and the trips they have just taken in Canada.

U.S. Air Exit Survey -

The U.S. Air Exit Survey was conducted for the first time in 1971 by the Canadian Government Travel Bureau in co-operation with other federal departments, provincial governments, carriers and members of the media. As for the U.S. Auto Exit Survey, the time period surveyed for this study was July to September. While the visitors were on board the aircraft returning to the United States, they were asked to complete a questionnaire which dealt with their characteristics and their just-completed trip to Canada.



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U.S. Visitors to Canada

According to

Simmons Data, Better Homes and Gardens Survey and the
U.S. Auto and Air Exit Surveys

A. Highlights of the Comparison

Results from these three surveys show:

- At least 66% of all U.S. visitors come from the North-East and Central regions.
- 87% of U.S. visitors live in urban areas.
- The median annual income of these visitors lies in the interval of \$10,000-\$14,999.
- Those who attended and/or graduated from university or college constituted 40% of U.S. visitors.
- There were 2 adults in the average party. 4 out of 10 parties included children.
- U.S. visitors to Canada generally spend only a little more than half of their total number of nights away from home in Canada.
- The median age of female visitors to Canada is between 35 and 49 years.
- A little more than 8 out of every 10 families visiting Canada are homeowners.

The following differences in the results are most noticeable:

- According to the Simmons data and the Auto Exit Survey, the largest proportion of U.S. visitors come from the North-East region. Better Homes and Gardens indicated that the largest proportion were from the Central region.
- 17% of those interviewed by Simmons came from cities of more than 500,000 people. This is compared to 59.6% in the Better Homes and Gardens study.
- The largest proportion of visitors sampled in the Auto Exit Survey were skilled labourers. Better Homes and Gardens indicated that the largest proportion of visitors were engaged in professional and managerial occupations.
- The largest proportion of visitors in the Better Homes and Gardens study earned between \$5,000 and \$9,999. The other surveys showed the largest proportion from the \$15,000 and more income level.
- 94.7% of those sampled in the Better Homes and Gardens survey were married compared to 77.4% in the Simmons survey.

FIG. I: GEOGRAPHIC ORIGIN OF U.S. VISITORS TO CANADA



Key

- a. Simmons Data
- b. Better Homes & Gardens
- c. Auto Exit Survey
- d. Air Exit Survey

B. Details of the Comparison

1. Geographic Origin of Visitors

Both the Simmons survey and the Auto Exit Survey indicated that the largest proportion of visitors originated from the Northeast region of the United States, the second largest from the Central Region and the least from the South. On the other hand, the Auto Exit Survey showed a significantly larger percentage coming from the Northeast (43% compared to 35% from Simmons) and a smaller percentage from the South (5% compared to 12% for Simmons). The Simmons Data (as well as the Better Homes and Gardens Study) however, refers to those who have visited Canada at least once in the last 5 years while the Auto Exit Survey relates to the actual person trips that were in the summer of 1971. Therefore, it is reasonable to expect that visitors from the Northeast Region are more likely to travel to Canada more than once in a five year period than are those from the South. This apparant discrepancy actually reveals that a higher proportion of Southerners have been to Canada than the straight origin analysis would reveal in any one year's visitor survey.

The proportion of visitors from each region shown by the Better Homes and Gardens study were similar to the results of the Simmons data and the U.S. Auto Exit Survey; however the magazine survey showed that the largest proportion of visitors came from the Central Region (37%) by a narrow margin over the Northeast (35%).

As could be expected a larger proportion of air visitors than auto visitors come from the more distant Souther Region. Fewer visitors from the Northeast and Central Regions travel by air to Canada.

2. Population Density of Origin

Data on this characteristic of U.S. visitors to Canada was collected by Simmons and Better Homes and Gardens on a metropolitan basis. Results of the magazine study tended to show that a larger proportion of these visitors came from major cities than did Simmons. 59% of the magazine's respondents lived in cities of 500,000 or more people compared to 17% of those sampled by Simmons (See Table IA)

TABLE IA

Population Density of Origin

<u>Simmons</u>		<u>Better Homes and Gardens</u>	
<u>Population Density</u>	<u>%</u>	<u>Population Density</u>	<u>%</u>
1 million or more	11.6	2 million or more	35
500,000 - 999,999	5.4	500,000 - 1,999,999	24
250,000 - 499,999	4.5	50,000 - 499,999	17
100,000 - 249,999	4.7	2,500 - 49,999	10
less than 100,000	5.4		
Metro suburban(rural)	6.5	Rural	14
Non-metro rural	6.5		
Metro suburban (urban)	42.5		
Non-metro urban	12.9		

The U.S. Visitors Survey, on the other hand, collected this data on the ADI (Area of Dominant Influence) level rather than on the urban/rural level. The boundaries of each ADI in the U.S. extend beyond those of the principal metro centre to encompass the area covered by the dominant television station(s). Used principally for television and magazine buying purposes, the 207 ADI's in the U.S. follow county boundaries.

Although information on the population density of origin was not collected per se during the U.S. Visitors Survey, it is possible to determine the proportion of visitors originating from various population-sized ADI's and compare that to the proportion of the total U.S. population residing in these ADI's. (See Table IB).

TABLE IB
Population Density of Origin ADI
(from U.S. Visitors Survey)

<u>Population Density</u>	<u>% of U.S. Visitors to Canada</u>	<u>% of U.S. Population</u>
1 million or more	69%	71%
500,000 - 999,999	15%	16%
100,000 - 499,999	9%	13%
less than 100,000	7%	1%

The proportion of U.S. visitors travelling from the various sized ADI's conforms quite closely to the proportion of the U.S. population residing in them except for the smaller sized ADI's with less than 100,000 people where a relatively high proportion of visitors live. These smaller ADI's sending a relatively high proportion of visitors to a large extent consist of those less populated areas close to the Canadian border, especially in New England, where there are strong family and business ties with contiguous provinces.

In comparison with TABLE IA above, these figures agree in that they suggest the largest proportion of U.S. visitors come from the more densely populated areas.

3. Length of Stay

Air travellers tend to stay longer in Canada (9.3 nights on average). The Auto Exit Survey indicated a longer average length of stay and length of time on the entire trip than did the magazine's survey. Both studies, however, revealed that U.S. visitors on the average spend only slightly more than one half of their entire trip away from home in Canada. (See Table II).

TABLE II

	<u>Better Homes & Gardens</u>	<u>Auto Exit Survey</u>	<u>Air Exit Survey</u>
--	---------------------------------------	-----------------------------	----------------------------

Average nights on trip	8.7	9.7	N/A
Average nights in Canada	4.6	5.3	9.3

4. Party Composition

Data on party composition was collected for all of the studies except for the Simmons Survey. The results from the U.S. Auto Exit Survey and the Better Homes and Gardens Study were very similar with the average number of adults in the parties covered by the magazine survey at 2.4 compared to 2.2 for the other one 38% of the parties covered by Better Homes and Gardens included children. This was nearly 5% less than the percentage shown by the Auto Exit Survey.

Not surprisingly, the percentage of parties with children travelling to Canada by air is a great deal smaller (7%). If only those air visitors vacationing in Canada are considered, the percentage of parties with children increased to 11%. (See Table III)

TABLE III

	<u>Better Homes & Gardens</u>	<u>Auto Exit Survey</u>	<u>Air Exit Survey</u>
Average number of adults in party	2.4	2.2	N/A
Percentage of parties with children	38%	43%	7%

5. Marital Status

A much larger percentage of those travelling to Canada according to Better Homes & Gardens are married than is reported in the Simmons data (94% compared to 77%). (See Table IV.) Since the magazine survey was concerned with family travel, this could have been anticipated.

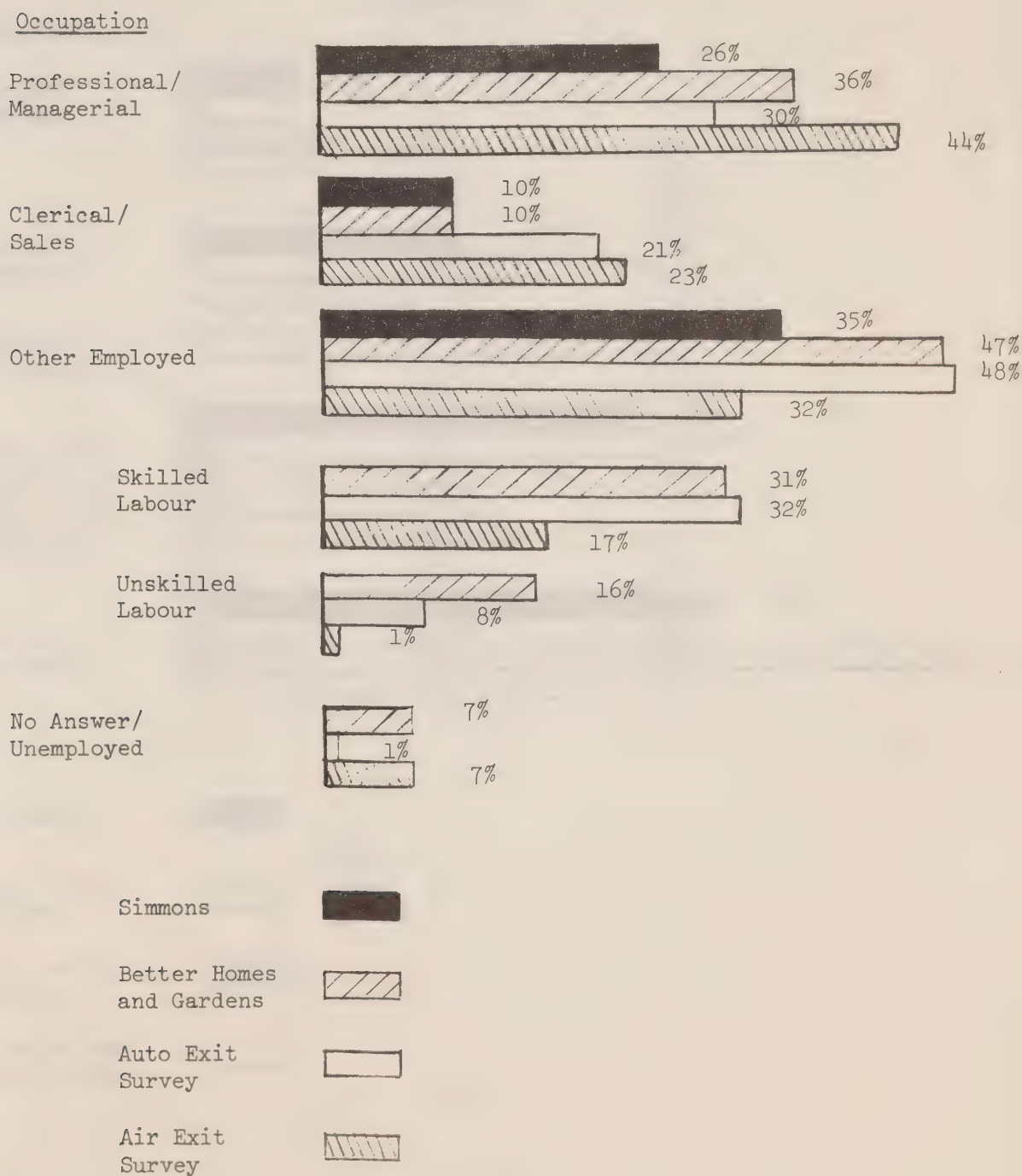
TABLE IV

	<u>Simmons %</u>	<u>Better Homes & Gardens %</u>
Single, widowed, divorced, separated	23	6
Married	77	94

6. Occupation

The Better Homes and Gardens results were closest to those of the U.S. Auto Exit Survey for all occupations but those in the sales and clerical category. (See figure II). In this occupational group, both the Simmons study and the magazines study agreed that the proportion of visitors was 10%. Air visitors were more likely to be professionals, executives, managers or business owners.

Figure II

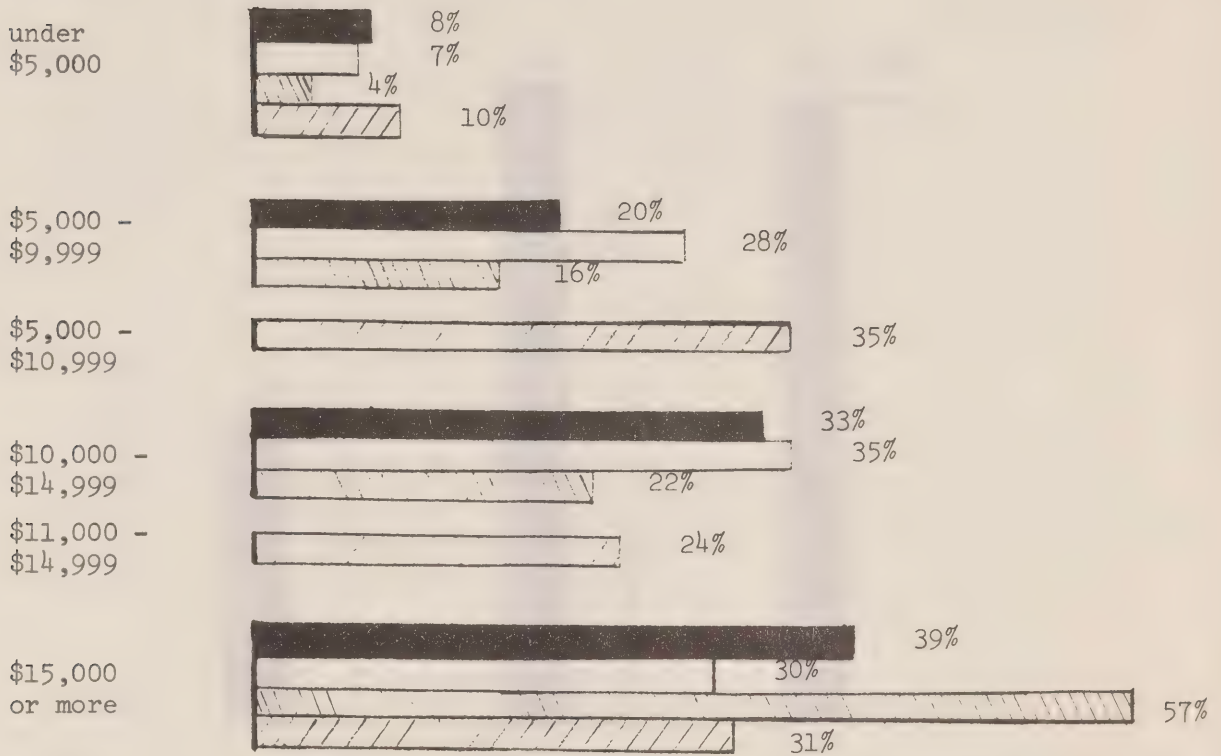


7. Income

There is a significant difference in the results concerning the household income category. As expected, air travellers tend to come from the more prosperous segments of the U.S. population. Over half of them earned more than \$15,000 annually. (See figure III).

Figure III

Income



Simmons

Auto Exit
Survey

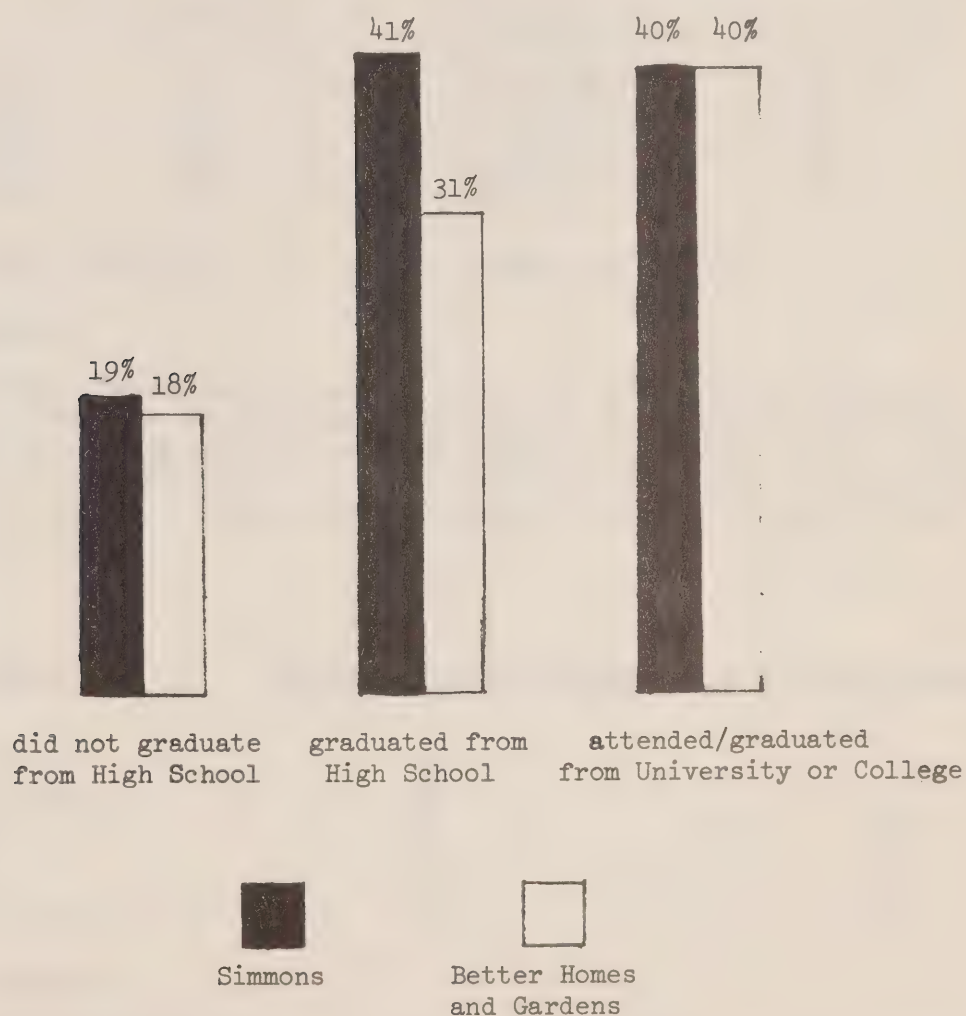
Air Exit
Survey

Better Homes
and Gardens

8. Education

The results from Simmons and Better Homes and Gardens were very similar (See figure IV). 11% of those responding to the Family Opinion Inc. questionnaire did not answer this question. Therefore, any differences in the figures could be explained to a large extent by this non-response. 40% of those covered by both surveys had at least attended university.

Figure IV



9. Age

Only Simmons and Better Homes and Gardens inquired about age. Homemakers' ages from the latter survey were compared to females' ages in the Simmons data. Because of differences in the breakdown of ages, the results are hard to compare. However, by looking at the median ages, it can be seen that the Simmons study indicated that younger women tend to travel to Canada more. (Table V). 47% of those in the magazine survey were less than 50 years old. This is compared to 68.2% resulting from the Simmons survey.

TABLE V

<u>Simmons</u>		<u>Better Homes and Gardens</u>	
<u>Age</u>	<u>%</u>	<u>Age</u>	<u>%</u>
18-24 yrs	17	Under 30 yrs	12
25-34 yrs	20	30-39 yrs	15
35-49 yrs	31	40-49 yrs	20
60-64 yrs	23	50-59 yrs	23
65 + yrs	9	60 + yrs	29
Median age 35-49 yrs		Median age 49 yrs	

10. Family Size

Data on family size were only collected in the Better Homes and Gardens study and the U.S. Auto Exit Survey. As could be expected, the largest proportion of U.S. families travelling to Canada have 3 or fewer members. (See Table VI). Over half of the air visitors come from single-member households. (Single-member households were not covered in the magazine study).

TABLE VI

<u>Family Size</u>	<u>Better Homes and Gardens</u>	<u>U.S. Air Exit Survey</u>
	<u>%</u>	<u>%</u>
One	0	54
Two	44	16
<u>Three or more</u>	<u>56</u>	<u>7</u>
Three	20	N/A
Four	18	N/A
Five	10	N/A
Six or more	8	N/A

11. Home Ownership

Home ownership was only included in the Better Homes and Garden Study on the Family Vacation Market. It indicated that nearly 9 out of 10 U.S. families travelling to Canada own their home.

TABLE VII

	<u>%</u>
Own Home	88
Rent Home	12

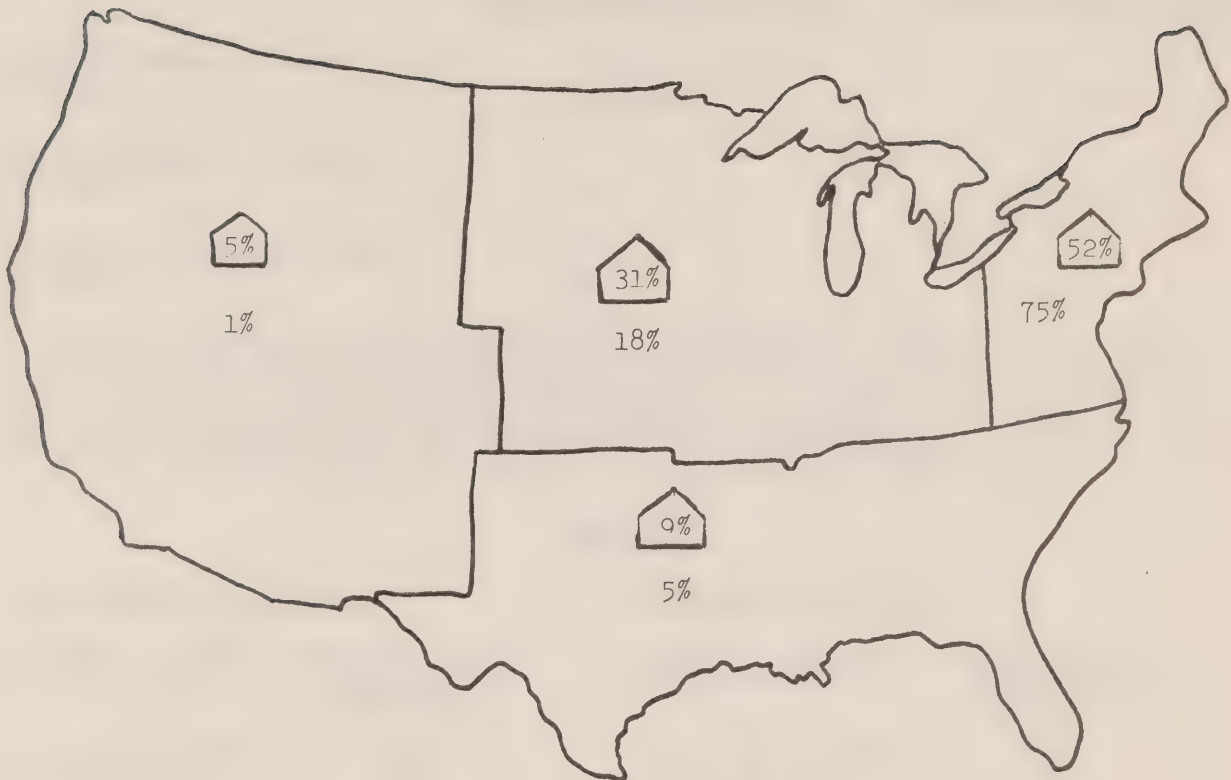
Appendices

- A. U.S. Visitors to Quebec
- B. U.S. Visitors to Ontario
- c. U.S. Visitors to British Columbia

As well as examining U.S. family travel to Canada as a whole, the Better Homes and Gardens Study also gives separate results on the origin, length of stay, party composition and income of U.S. visitors to Quebec, Ontario and British Columbia. Since the U.S. Auto Exit also has information at the provincial level, its results and those from the survey of U.S. family travel can be compared. Such a comparison is found in the following appendices.

Appendix A - U.S. Visitors to Quebec

1. Geographic Origin



 0% - Better Homes and Gardens Study

0% - U.S. Auto Exit Survey

Fig. 1A - Percentage of U.S. Visitors to Quebec from each Nielsen Region.

Both of these surveys indicated that most of Quebec's U.S. visitors came from the Northeast Region and the fewest come from the West.

According to the U.S. Auto Exit Survey 3/4 of all U.S. trips to Quebec during the summer of 1971 were from the Northeast region. The Better Homes and Gardens results showed that more than half of all U.S. visitors who had come to Quebec at least once were from here. Together, these results seem to indicate that there are more repeat visits from the Northeast as well.

The U.S. Auto Exit Survey indicated that U.S. visitors stayed 2 days longer on average in Quebec than did the Better Homes and Gardens Survey. Although these surveys agreed closely on the average number of adults there were per party, the Better Homes and Gardens figure for the percentage of U.S. parties travelling with children was 8% lower than that from the U.S. Auto Exit Survey. (See Table 1A). This discrepancy can be explained in part by the fact that the U.S. Auto Exit Survey only covers U.S. visitors travelling to Canada from July to September, 1971.

TABLE 1A

	<u>Better Homes and Gardens</u>	<u>U.S. Auto Exit Survey</u>
Average length of stay in Quebec	3.1 days	5.3 days
Average number of adults per party	2.0	2.2
Percentage of parties with children	33%	41%

Income figures resulting from these two surveys are difficult to compare because of the different income breakdowns used. Both agreed that over half of the U.S. visitors earned more than 10% annually (see figure 2A). The U.S. Auto Exit Survey indicates that 38% of these visitors earned more than \$15,000 which is 5% more than results of the Better Homes and Gardens Study showed.

TABLE 2A

<u>Better Homes and Gardens</u>		<u>U.S. Auto Exit Survey</u>	
<u>Household Income</u>	<u>Percentage of Households</u>	<u>Household Income</u>	<u>Percentage of Households</u>
Less than \$5,000	11%	Less than \$5,000	6%
\$5,000-\$7,999	9%	\$5,000-\$9,999	24%
\$8,000-\$10,999	18%	\$10,000-\$14,999	32%
\$11,000-\$14,999	29%	\$15,000 or more	38%
\$15,000 or more	33%		

Appendix B - U.S. Visitors to Ontario

1. Geographic Origin

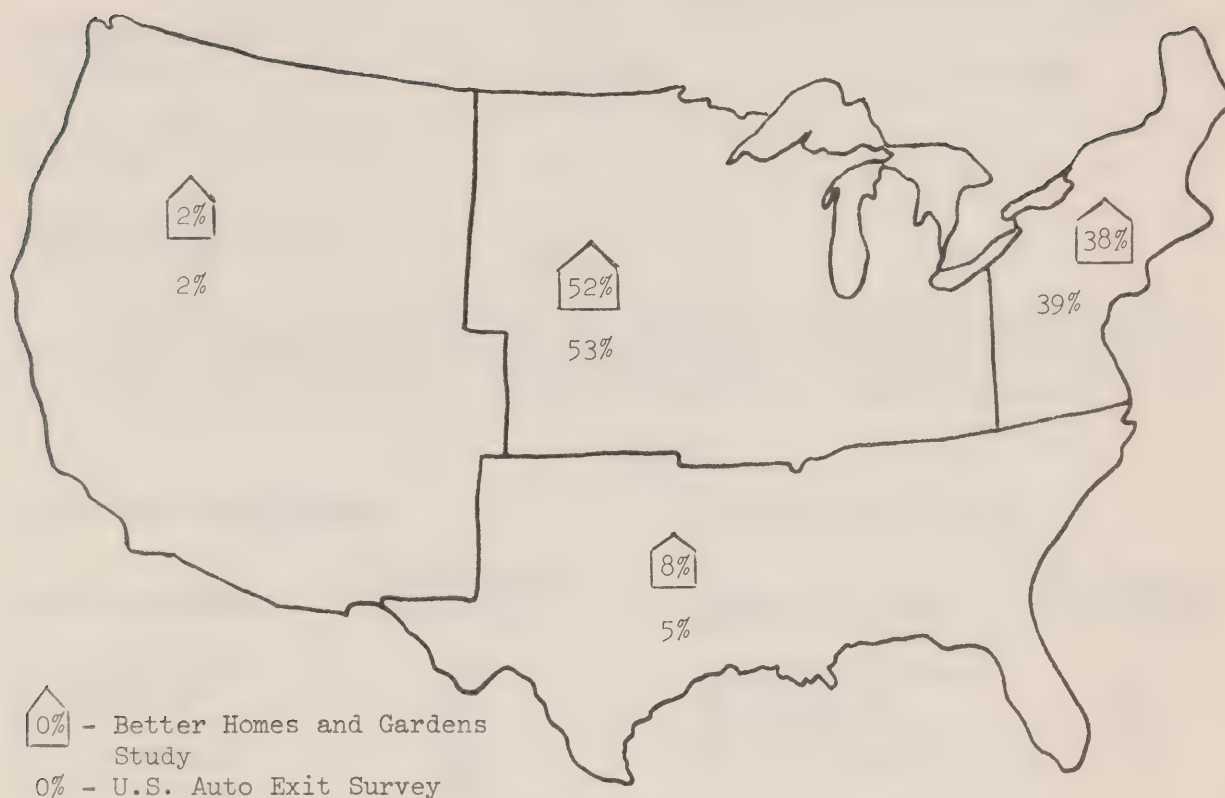


Fig. 1B - Percentage of U.S. visitors to Ontario from each Nielson Region.

The distribution of origins of Ontario's U.S. visitors were closely agreed upon by these two surveys. Over half of these visitors were from the Central Region while almost 4 out of every 10 were from the Northeast. The smallest proportion of Ontario's visitors travelled from the West.

Again, the Auto Exit Survey results indicated a longer average length of stay of U.S. visitors to Ontario than did the magazines survey (5.2 days as opposed to 4.3 days). However, these surveys both indicated that there were, on average, 2 adults per party and that a little more than 4 out of 10 parties included children (See Table 1B).

Table 1B

	<u>Better Homes and Gardens</u>	<u>U.S. Auto Exit Survey</u>
Average length of stay in Ontario	4.3 days	5.2 days
Average number of adults per party	2.2	2.2
Percentage of parties with children	43%	45%

According to these surveys, 6 out of 10 U.S. visitors to Ontario in 1971 came from households where the annual income was over \$10,000 (See Table 2B). 1/3 of the total number of U.S. visitors earned over \$15,000 annually.

Table 2B

<u>Better Homes and Gardens</u>		<u>U.S. Auto Exit Survey</u>	
<u>Household Income</u>	<u>Percentage of Households</u>	<u>Household Income</u>	<u>Percentage of Households</u>
Less than \$5,000	11%	Less than \$5,000	7%
\$5,000-\$7,999	14%	\$5,000-\$9,999	28%
\$8,000-\$10,999	16%	\$10,000-\$14,999	35%
\$11,000-\$14,999	26%	\$15,000 or more	30%
\$15,000 or more	33%		

Appendix C - U.S. Visitors to British Columbia

1. Geographic Origin

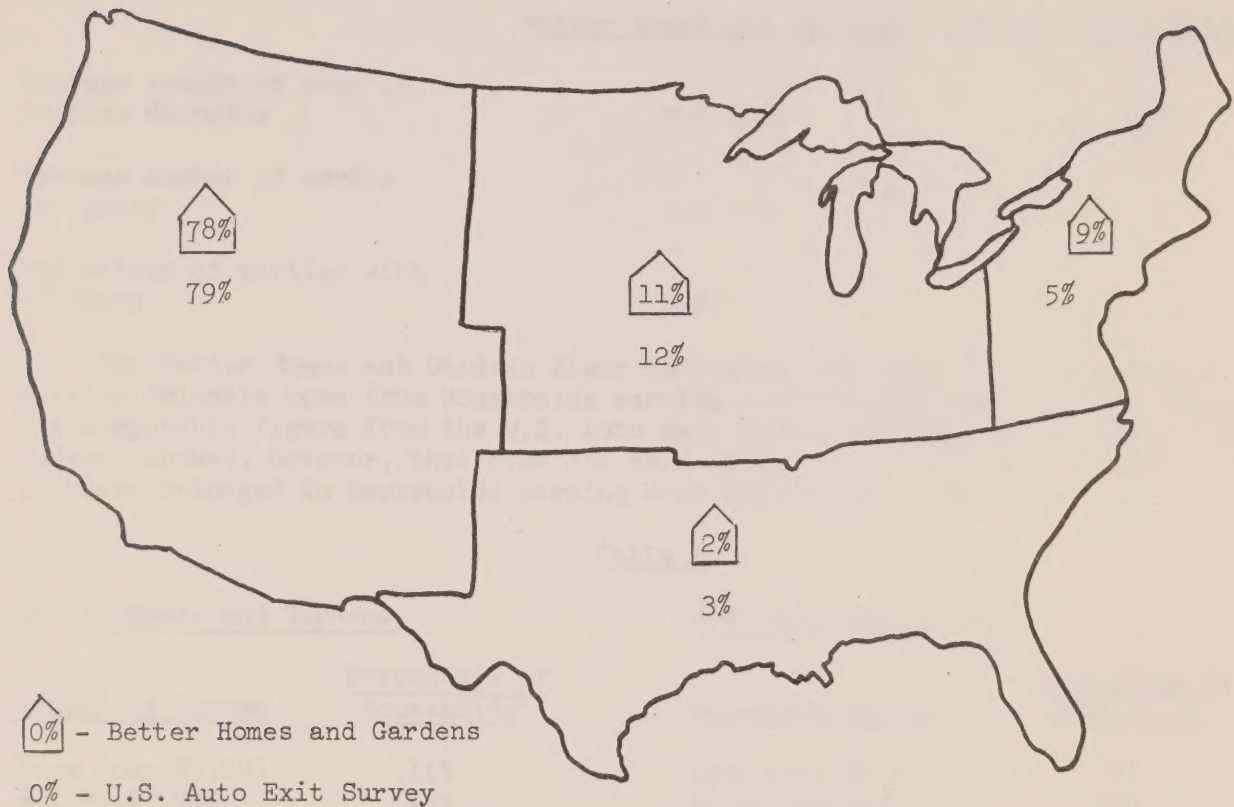


Fig. 1C - Percentage of U.S. Visitors to British Columbia from each Nielsen Region.

As could be expected, the results of these two surveys show that almost $\frac{4}{5}$ of all U.S. visitors and trips to British Columbia were from the West. Visitors from the Southern Region were the least likely to visit this province.

U.S. visitors to British Columbia stayed an average of 35 days according to the Better Homes and Gardens Study. However, the U.S. Auto Exit Survey indicated an average length of stay of 6.7 days. Again, this discrepancy can be explained in part by the fact that the latter survey only covered the summer months instead of the whole year. The average party visiting British Columbia contained 2 adults while about 1/3 of the parties included children. (See Table 1C).

Table 1C

	<u>Better Homes and Gardens</u>	<u>U.S. Auto Exit Survey</u>
Average length of stay in British Columbia	3.5 days	6.7 days
Average number of adults per party	2.3	2.3
Percentage of parties with children	32%	33%

The Better Homes and Gardens Study indicated that 45% of U.S. visitors to British Columbia come from households earning over \$15,000 annually (See Table 2C). The comparable figure from the U.S. Auto Exit Survey was much lower (26%). Both surveys showed, however, that over one half of all U.S. travellers to this province belonged to households earning over \$10,000 per year.

Table 2C

<u>Better Homes and Gardens</u>		<u>U.S. Auto Exit Survey</u>	
<u>Household Income</u>	<u>Percentage of Households</u>	<u>Household Income</u>	<u>Percentage of Households</u>
Less than \$5,000	11%	Less than \$5,000	7%
\$5,000-\$7,999	13%	\$5,000-\$9,999	27%
\$8,000-\$10,999	13%	\$10,000-\$14,999	40%
\$11,000-\$14,999	18%	\$15,000 or more	26%
\$15,000 or more	45%		

